

Vendor Customer Modification

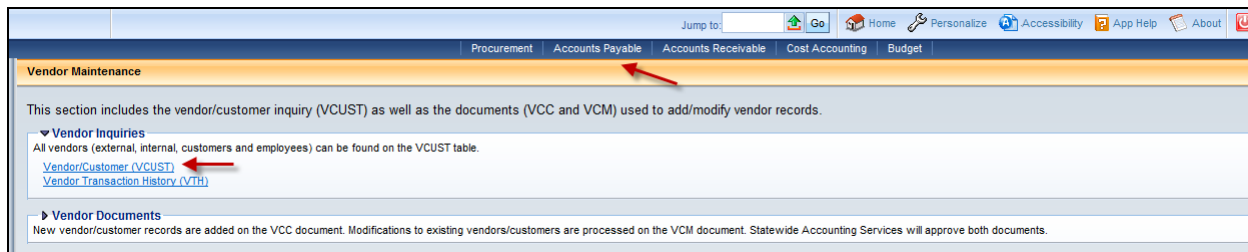
Master Address Modification

NOTE: If a new address is needed (Ex: add a payment address), create it on the Address Information section of the VCM. Instructions are at the end of master address modification instructions.

A Vendor Customer Modification (**VCM**) document is created to modify or add information on a current Vendor record. This document is used to update the Vendor Customer table information, Customer Account Options table information, and 1099 Reportable Information table information. No agency approvals are required on the **VCM**. Once submitted, the document will route to Finance Statewide Accounting for review and approval.

One of the most common uses of the **VCM** document is to change the Master address on a current Vendor record. The following steps will walk you through the process of changing the master address for a vendor.

1. To go to the **VCUST** table and bring up the vendor record. Click on the **Accounts Payable Workspace** at the top of the screen and select the **VCUST** link. Or, you can type **VCUST** in the **Jump To** box at the top of the screen, then click **Go**.



2. When the search box opens, search for the vendor record. You can **search by name or by vendor code**. Click on **OK**.

- The vendor record(s) will be displayed. If there are multiple records, click to highlight the record to be updated. Review the existing vendor record to see how it is set up. Knowing this will help with the modification process. For the Master Address change, go to the **Address Section** to see if there is only one, or if there are multiple addresses. Addresses will have Codes. (Ex: AD001, AD002, etc. If the vendor registered on the KY Vendor Self Service site, the Codes will be PC001, PC002, etc).

Address

Address Type	Street 1	City	State/Province	Zip/Postal Code	Principal Contact
✓ Payment	10309 OAK GROVE RD	LOUISVILLE	KY	40291	NO CONTACT IDENTIFIED
Ordering	10309 OAK GROVE RD	LOUISVILLE	KY	40291	NO CONTACT IDENTIFIED

First Prev Next Last

Save Undo Delete Insert Copy Paste

Vendor/Customer : VC0000071578
JOHN SMITH

Address Type : Payment

Division/Department :

Additional Address Info. :

Prevent New Spending : ☐

Default Currency : USD - US Dollar

Active From : 05/06/2006

Active To : 06/30/2040

Default Record : ☒

Mail Returned : ☐

Active Address : Yes

▼ Address Information

Address ID : AD001

Country Phone Code : 1

Street 1 : 10309 OAK GROVE RD

Phone : 999-999-9999

Street 2 :

Phone Extension :

City : LOUISVILLE

County :

State/Province : KY

County Name :

Zip/Postal Code : 40291

Country : US

- Click back on the **Vendor Customer Section** to continue with creating the VCM. At the bottom of this screen, click on **Modify Existing Record** to generate the VCM.

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- Enter your **Dept #**, no Unit is needed. Check **Auto Numbering**, then click on **Create Document**. A **VCM** is generated with the vendor code and all the information that was on the Vendor/Customer section of the vendor record.
- On **Header**, in the **Document Description** field, enter the reason for the modification. (EX: Change the Master Address)
- Go to the **Master Address** section, **Insert a New Line**. **Line Action** will be **Modify**.

8. Open the **Modify Existing Address** tab. From the **Pick List** Drop Down Box, select the **Address Code** to be changed.

The screenshot shows a web form titled "Master Address" with a header bar containing "Total Lines: 1", "Line Action: Modify", and "Address ID:". Below the header is a table with columns: "Line Action", "Address ID", "Street 1", "Street 2", and "City". A "Modify" button is visible. Below the table, it says "From 1 to 1 Total: 1" with "First", "Previous", and "Next" buttons. The main form area has a "Line Action:" dropdown menu set to "Modify" (indicated by a red arrow) and a "Headquarters:" text field. Below these is a tabbed interface with three tabs: "Add New Master Address", "Modify Existing Master Address" (which is selected), and "Address Information". Below the tabs is an "Address ID:" text field with a green up arrow icon (indicated by a red arrow).

9. On the **Address Information** tab, remove the old address information and type in new address, telephone number, email etc.
10. **NOTE:** If you are changing the **Master Address**, click back on the **Vendor/Customer** section. Also enter the new address in the **Location Name** field. By making the Location Name and the Master Address the same, it will make the vendor search easier to choose the vendor you need when searching on VCUST. **IF the Location Name has an Agency name** in it, such as for Revenue Use Only, KIA Use Only, etc, do not change it. There may be EFT banking information that is specific to that agency's payments on this particular vendor record.

VCM View of Location Name

Vendor/Customer				Total Lines: 1	Line Action: Modify	Legal Name: JOHN SMITH
Line Action	Legal Name	Vendor Active				
Modify	JOHN SMITH	Active				
From 1 to 1 Total: 1						
<div>Line Action: Modify</div> <div>Vendor/Customer: VC0000071578</div>						
<div>General Information</div> <div>Headquarters</div> <div>Organization</div> <div>Disbursement Options</div> <div>Prenote/EFT</div> <div>Remittance Advice</div> <div>Summary of Approval Modifications</div> <div>Executive Compensation</div>						
<div>Alias/DBA:</div> <div>Location Name: 10309 OAK GROVE RD</div> <div>Legal Name: JOHN SMITH</div> <div>Department:</div> <div>Unit:</div> <div>Active From: 05/05/2006</div>						

VCUST View of the Location Field







General Info	
Vendor/Customer: VC0000071578	Restrict Use by Department: <input type="checkbox"/>
Legal Name: JOHN SMITH	Miscellaneous Account: <input type="checkbox"/>
Alias/DBA:	Internal Account: <input type="checkbox"/>
Vendor Active Status: Active	Third Party Only: <input type="checkbox"/>
Vendor Approval Status: Complete	Third Party Vendor: <input type="checkbox"/>
Customer Active Status: Inactive	Third Party Customer: <input type="checkbox"/>
Customer Approval Status: Incomplete	Inventory Customer: <input type="checkbox"/>
Location Name: 10309 OAK GROVE RD	Never Archive: <input type="checkbox"/>
First Name: JOHN	Restrict VSS Access: No
Middle Name:	Discontinue - No New Business: <input type="checkbox"/>
Last Name: SMITH	Prevent MA Reference: <input type="checkbox"/>
Company Name:	PunchOut Enabled: <input type="checkbox"/>
Vendor Performance Rating:	Re-PunchOut Enabled: <input type="checkbox"/>
	Electronic Order Enabled: <input type="checkbox"/>
	Active From: 05/05/2006
	Active To: 06/30/2040
	Last Usage Date: 05/07/2006
	Department:
	Unit:

11. Click **Validate**.

12. Click **Submit**, the VCM will go to Pending Status for approval. **VCCs** and **VCMs** will route to a vendor worklist and are reviewed and approved by the Finance Statewide Accounting or Customer Resource Center office.

NOTE: To add an additional address, use the **Address Information** section

1. **Insert a New Line.**
2. **Line Action** will be **New**.
3. Choose the new **Address Type** from the Drop Down box and check the **Auto-Generate** box. Go to the **Address Information** tab, type in the new address and phone number, etc.
4. Go to the **Contact Section below the address** and **choose a contact** for this address. **Validate** and **Submit**.

Address Information									
Total Lines: 1 Line Action: Address ID: Address Type:									
Line Action	Address ID	Address Type	Street 1	City	State/Province	Zip/Postal Code	Principal Contact	Additional Address	
From 1 to 1 Total: 1 First Previous Next Last									
<div>Line Action: <input type="text" value="New"/>  </div> <div>Vendor/Customer: <input type="text"/></div> <div>Bypass Address Validation: <input type="checkbox"/></div>									
<div>Add New Address Modify Existing Address Address Information Other Address Information Prenote/EFT Remittance Advice Contact Information Contact Address Information</div>									
<div>New Address Type: <input type="text" value="Payment"/>  </div> <div>New Address ID: <input type="text"/> </div> <div>Auto-Generate: <input checked="" type="checkbox"/> </div>									